Cañada College

CAMPUS ANNOUNCEMENT

Dear College Community,

It's time for an update on the CRM! The teams have been quite busy over the past few months launching Phase 2 of the implementation and preparing for future phases. Phase 2 was launched on June 29th and included Enrollment Steps Success Plans, Success Team Assignments, Matriculation Messages and Journeys, Systems Integration, and integration with Single Sign On (SSO) and the Student Welcome & Admissions Letter.

Here's what has been accomplished and what's on the horizon for the next few months:

1. **Request for Information (RFI) Forms:** All three colleges launched Request for Information (RFI) forms on college homepages which have resulted in hundreds of prospective students inquiring with the colleges, being sent automated information through the use of Marketing Cloud, and encouraged to apply. Student Ambassadors in the Recruitment Office have followed-up with students who haven't applied after receiving the automated messages to help answer any questions they may have about coming to the college.
    a. **Continuous Improvement (CI) Process and Data Analysis:** Recruitment and Marketing Teams will begin to analyze the internal processes and conversion rates related to the RFI process to determine ways to improve the process and messaging. The first CI analysis will take in September.

2. **International Application Updates:** The International Students Offices have been using the CRM for a number of years to manage the admissions process

for international students. The ITS CRM team worked with the college ISP offices and district ISP personnel to update the application to align with the new data architecture shared on the domestic side in order to utilize the same Salesforce platform throughout the district.

a. **Testing and Configuration:** The new updates to the International Admissions Application are in production. These updates include improvements to the configuration of the application and the option for students to apply to the GOL program (Global Online Learning).

b. **Phase 2 Launch:** New Students that are International students (F1) have been included in the Phase 2 launch, and now have access to login to the student portal where they can find their enrollment steps and success team members. They also receive Marketing Cloud messages from the CRM about their matriculation process. The CRM team is working with the International Students Offices to add GOL students to the Student Success Link soon.

3. **Enrollment Steps Success Plans:** Phase 2 of implementation included the Enrollment Steps for New Students to Higher Education. These are students considered "Non-Exempt" from the matriculation steps of orientation, assessment/placement and counseling/SEP creation. The colleges have created the Enrollment Steps students need to complete in order to become enrolled at the college as these will appear as "To-Do List" items for the student.

   a. **Integration:** ITS Staff completed the integration necessary for both the CRM, Banner and Marketing Cloud to move information back and forth regarding these areas. This includes:

      i. The student receiving customized messages and calls when they are not progressing in their enrollment steps.

      ii. Banner receives information on student meeting attendance to report back through MIS.

   b. **Continuing Integration:** Currently students see their Enrollment Step "To-Do List" as view only. ITS is working to have Enrollment Steps integrated with Banner, which would allow a student's enrollment step to be marked "complete" when Banner indicates the student has satisfied that step.

4. **Success Team Assignments:** The CRM has built in functionality to be able to assign Success Teams to students based on programmed criteria. The colleges have worked to determine the beginning of Success Team assignments and those have been programmed into the CRM. Criteria has been determined for:

   a. Recruiters

   b. Financial Aid Team Members

   c. Residency Specialists

   d. Success Navigators (Those to help with matriculation steps)

   e. General Counselors (As part of the initial counseling appointment of matriculation)

   f. Specialized Counselors (Based on criteria such as Meta Major, EOPS, Promise, etc.)

      i. **Testing and Configuration:** This initial phase of assignments was tested by the vendor and internal ITS staff during the months of March and April.

      ii. **Implementation:** Success Team Assignments have been completed and implemented in the Phase 2 launch.

5. **Matriculation Messages and Journeys:** The Marketing Teams took the work completed during the Matriculation Retreats at each college last summer and built the email templates into Marketing Cloud during the month of January. The ITS CRM Team has completed mapping the email messages to the appropriate data fields in the CRM, in order to create customized messages for each student along with building the journeys, i.e. Process Maps developed by the colleges for their matriculation processes.

   a. **Testing and Configuration:** The ITS CRM Team completed initial testing of the Matriculation Messages and Journeys throughout the month of June.

   b. **Implementation:** The ITS CRM Team implemented Matriculation Messages and Journeys on June 29th as part of the Phase 2 launch.

6. **Systems Integrations:** Integration of various data systems is one of the most time intensive parts of the CRM project. The ITS team has been working with our

implementation partners, Enrollment RX and APEXIT, to build out the integrations so that the data that needs to be in the CRM for both students and employees, is readily available. Updates on various integrations:

a. **CCCApply to Banner to CRM (Initial Application):** ITS is in the final stages of testing this integration prior to production. This has led to a number of areas in which SMCCCD internal controls and processes need to take place in order to move forward with the project. This includes:

    i. Program of Study Updates

    ii. Student Personal Email Updates

    iii. Paper Admissions Application Usage

    iv. The CRM Implementation Team has worked with staff to update processes around these areas in order to proceed with the project.

b. **Banner to CRM (Continuing Integration):** This is well underway as members of APEX IT and District ITS work to identify and map the appropriate fields that will change more frequently after the student has applied. For example, phone number, grades and being a member of a Learning Community. Integration has been completed for Phase 2 of implementation, but this will be an ongoing effort to continue to improve integration. As we continue to test this component of the project we may experience similar needs in updating business processes.

7. **Single Sign On (SSO) and App Development:** As part of Phase 2 implementation of the CRM, SMCCCD launched the Single Sign On (SSO) experience for students which includes the "mySMCCD Student Portal". The mySMCCD Student Portal allows the student to access a variety of systems such as Canvas, WebSmart, and the CRM while only needing to log-on one time. The technical name for the portion of the CRM we are using is called Salesforce Advisor Link (SAL), the internal name selected based on the survey results is the "Student Success Link" (SSL).

8. **Counseling Appointments**: This summer many counselors attended one or more trainings on the use of Student Success Link (SSL) and the process by

which they set up their calendars in the system to allow students to self-schedule appointments. Phase 3 includes bringing counselors fully into the SSL and allowing students to make appointments with counselors directly. More trainings will be scheduled for counselors who have not been trained yet.

a. **Discovery**: In September, the CRM Team will revisit appointment scheduling with the counselors to get everyone fully functioning in the system.

9. **Phase 3 and 4:** Phases 3 and 4 are planned to launch in Fall 2020. The CRM Team is working to complete the required discovery and process maps for these phases. After discovery and process maps are completed, each feature will be given a more specific launch date.
   a. Phase 3
      i. Document Management System solution
      ii. Retention/Early Alerts
      iii. Counseling Appointments
   b. Phase 4
      i. Grant/Categorical Programs/Additional Services

As the project is constantly evolving, some of the work has shifted in scope and timeliness. Checkout the Technology Taskforce website for timelines and past updates.

If you have any questions about the CRM, the implementation, or specific solutions or vendors, please direct your questions to Dean Max Hartman.